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# **ShoreTel User's Guide for iPhone and iPod touch®**

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### **Company Information**

ShoreTel, Inc.

960 Stewart Drive

Sunnyvale, California 94085 USA

+1.408.331.3300

+1.408.331.3333 (fax)

[www.shoretel.com](http://www.shoretel.com)

# Table of Contents

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About This Book .....	.v
Online Knowledgebase .....	vi
<b>Chapter 1      Installing the ShoreTel Mobility Client Application .....</b>	<b>9</b>
Before You Begin .....	10
Connecting to a Wi-Fi Network .....	10
Installing & Provisioning the ShoreTel Mobility Client .....	10
Reprovisioning .....	13
Updating to the Latest ShoreTel Mobility Client .....	13
Uninstalling the ShoreTel Mobility Client .....	14
Using Your Mobile Device with the ShoreTel Dock .....	14
<b>Chapter 2      Getting Started .....</b>	<b>15</b>
The Mobility Client Application User Interface .....	15
Exiting The Mobility Client .....	17
<b>Chapter 3      Managing Calls .....</b>	<b>19</b>
Receiving Calls .....	19
Placing Calls .....	21
Using Personal Dial (Dual Persona™) Mode .....	22
Using Contacts and Recents to Place Calls from the ShoreTel Mobility Client .....	23
Using the Speaker .....	24
Muting a Call .....	24
Switching Between Calls .....	24
Transferring Calls .....	24
Managing Conference Calls .....	25
Changing the Network While on an Active Call .....	26
Accessing Voice Mail .....	26
Making Emergency Calls .....	27
<b>Chapter 4      Presence and Instant Message .....</b>	<b>29</b>
Presence Icons .....	30
Enabling Presence .....	31
Setting Presence Status .....	31

---

Setting Location .....	31
Editing the Presence Message .....	32
Adding and Deleting Buddies .....	32
Setting a Buddy's Access Level .....	33
Viewing Buddy Details .....	34
Sorting the Buddy List .....	34
Creating Groups of Buddies .....	34
Adding a Buddy to a Group .....	35
Sending Instant Messages to Buddies .....	35
Logging In/Out .....	39
Sending Email to a Buddy .....	39
Calling a Buddy .....	40
<b>Chapter 5      Secure Remote Access .....</b>	<b>41</b>
Before You Begin .....	41
Verifying that Secure Remote Voice Is Enabled .....	42
Verifying that Secure Enterprise Services Are Enabled .....	42
<b>Chapter 6      Searching for People, Places, and Things .....</b>	<b>45</b>
Using the Corporate Directory outside of the Enterprise .....	46
Searching Buddies, IM History, and More .....	46
Searching the Corporate Directory .....	46
Creating a Favorite .....	48
Deleting a Favorite .....	48
<b>Chapter 7      ShoreTel Mobility Client Settings .....</b>	<b>49</b>
Changing Common Settings .....	49
Changing Preferences .....	50
Changing Advanced Settings .....	52
Getting Help .....	54
<b>Appendix A      Dialing from a Meeting Invitation, Calendar Appointment, or Email .....</b>	<b>57</b>
Enabling Calendar Conference Dialing .....	57
Dialing From a Calendar Event .....	58
Dialing From an Email Message .....	58
<b>Appendix B      ShoreTel Communicator .....</b>	<b>61</b>
Enabling ShoreTel Communicator .....	61
Using Visual Voice Mail .....	62
Specifying Call Handling Mode .....	63

# Before You Start

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## About This Book

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This guide is for people who use the iPhone or iPod Touch with the ShoreTel Mobility Solution. You should have a basic understanding of the native system features and functionality of your device so that you can use this guide effectively.

The procedures in this guide may vary slightly depending on your device.

## Conventions

This guide uses the following advisory notices:



### **WARNING!**

Pay special attention to this information.



### **Note**

This information is extra, or supplementary.



### **Tip**

This information may be helpful to you.

This guide uses the following text conventions:

Marking	Meaning
<b>Bold text</b>	Objects, such as buttons and menus, that you select on your mobile device or computer.
Command text	Text examples that you need to type.
<i>Italic text</i>	Document titles or words with special emphasis.
<b>Menu &gt; Command</b>	A menu item that you select.

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## Related Documentation

The ShoreTel Mobility solution suite includes the following other documents:

- *ShoreTel Mobility Platform Support Guide*
- *ShoreTel Mobility Router Administrator's Guide*
- *ShoreTel Mobility Router 6000 Hardware Installation Guide*
- *ShoreTel Mobility Router 4000 Hardware Installation Guide*
- *ShoreTel Mobility Router 2000 Hardware Installation Guide*
- *ShoreTel Mobility Quick Reference Card: Features*
- *ShoreTel Mobility Quick Reference Card: Installation*

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## Online Knowledgebase

The ShoreTel online knowledge base provides more information about the current release or to resolve issues with the ShoreTel system. This password-protected, online database is available for authorized users through the ShoreTel support site at <http://support.shoretel.com>.

# CHAPTER

# 1

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## Installing the ShoreTel Mobility Client Application

After you install the ShoreTel Mobility Client application, use it as your dialer screen instead of your phone's dialer. With the ShoreTel Mobility Client, you can make and receive calls; view your call history; open Contacts; use Bluetooth and speed dialing; and also use enterprise telephony features, such as conferencing or forwarding or enterprise directory lookup of contacts.



### Note

Handover from Wi-Fi to the cellular network and from the cellular network to Wi-Fi is not supported on the iPod touch.

Some versions of the iPod touch do not have a microphone, so you need a headset for voice communications on these devices.

If you pair a Bluetooth device, your device automatically uses the Bluetooth device. Unpair the Bluetooth device to use the iPhone earpiece for audio. When using Bluetooth in a call, select **Speakerphone** on the iPhone to switch the call to the speakerphone. Select **Speakerphone** again to return to Bluetooth mode.

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Use this chapter to install the ShoreTel Mobility Client, as follows:

Before You Begin .....	10
Connecting to a Wi-Fi Network .....	10
Installing & Provisioning the ShoreTel Mobility Client .....	10
Updating to the Latest ShoreTel Mobility Client .....	13
Uninstalling the ShoreTel Mobility Client.....	14

## Before You Begin

Before you install the ShoreTel Mobility Client, you may need the following items and information:

- Data connection— See [Connecting to a Wi-Fi Network on page 10](#) for more information.
- Wi-Fi access point credentials—if setting up a Wi-Fi access point on your mobile device, any applicable name or password, as well as the security mode (for example, WPA or WPA2).
- User name and password—user name and password required for authentication with the Mobility Router.
- SIM card—a working SIM card inserted in the mobile device (for GSM devices only, and not required for the iPod Touch).
- Settings—time, date, and time zone set on the device before you provision the client.

## Connecting to a Wi-Fi Network

When you enable Wi-Fi on your mobile device, it scans for available Wi-Fi networks in the area. If the mobile device has never connected to an enterprise Wi-Fi network, choose it when prompted. You may need to provide the security key. After the mobile device connects to the Wi-Fi network, verify that the Wi-Fi connection icon appears on the mobile device. For more information, refer to the documentation for your mobile device.

You must set up at least one enterprise Wi-Fi access point before installing the ShoreTel Mobility Client. Before setting up a Wi-Fi access point on your mobile device, make sure that you have the following information:

- Name of a Wi-Fi access point in your enterprise network
- Credentials for the Wi-Fi access point (used for authentication with the access point)
- Security mode used by the Wi-Fi access point (for example, WPA or WPA2)

To set up a Wi-Fi access point on your mobile device:

1. From the Home screen, touch Settings > Wi-Fi.
2. Select the network for which you want to set up an access point.

## Installing & Provisioning the ShoreTel Mobility Client

To download and install the ShoreTel Mobility Client on your mobile device, select the link in the email that you receive from the ShoreTel Mobility Router. You can also download and install the ShoreTel Mobility Client using either the App Store or iTunes.

Make sure your device is connected to a Wi-Fi network before you begin. When the device is connected to a Wi-Fi network, the Wi-Fi icon on the Home screen is lit and is white.

### To download, install, and provision the ShoreTel Mobility Client via email message:

1. When you receive an email message from either your ShoreTel Mobility administrator or from the ShoreTel Mobility Router, select the link for downloading and installing the client, as follows:
  - If you are on-site, you are directed to a web page on your mobile devices which guides you through downloading and installing the client from the App Store.
  - If you are installing the client remotely, copy the link from the email message, paste the link into your mobile device's browser, and go to that web site for instructions.
  - When prompted, touch **OK** to allow the ShoreTel Mobility Client to use your current location.
2. After you install the ShoreTel Mobility Client, select the provisioning link from the ShoreTel email message and follow the prompts to provision your mobile device.
3. If prompted, enter your enterprise password.



#### Note

You can provision up to 5 devices (per account) based how your ShoreTel Mobility Router is configured. Check with your ShoreTel Mobility administrator if you encounter a conflict. The Primary Device is how your location is determined your location, so it should be the device you carry all the time. You can use all of your devices to make or receive calls, instant messages, and more.

4. Select the ShoreTel Mobility Client icon to open the application. While the ShoreTel Mobility Client connects to the server, a popup appears. Select **Dismiss** to continue.
5. Each time you open the ShoreTel Mobility Client, the **Registering** screen appears while the application is connecting to the server. You can check **Do not show again** to turn this off.



#### Note

The ShoreTel Mobility Client uses the native Apple method for determining location. The Client identifies which country your phone is in before making an outbound cellular call, in the following priority (only one is required):

- Cellular radio location (such as MCC)
- GPS or Wi-Fi based location
- manual input from you about your location when you are prompted for it

### To download the ShoreTel Mobility Client via the App Store:

1. From the Home screen, select the **App Store**.
2. Enter **ShoreTel** in the **Search** field. Locate the ShoreTel Mobility Client application and select **Install**.
3. Enter your **Apple ID** and **Password** and select **OK**.

## To download ShoreTel Mobility Client via iTunes:

1. On your Mac or PC, launch iTunes®.
2. In the iTunes store, enter ShoreTel in the **Search Store** field.
3. Locate the ShoreTel Mobility Client application and select the **Application** button.
4. Select the **Free App** button to download.
5. Enter your **Apple ID** and **password** in the application popup and select **Get**. The application automatically downloads into the local iTunes applications folder.
6. Connect your iPhone to your computer.
7. From iTunes, select the iPhone device in the left pane.
8. Click on the **Applications** tab.
9. Check the **Sync Applications** box.
10. Check the **ShoreTel** box.
11. Click **Apply**. The ShoreTel Mobility Client downloads to your iPhone.
12. Check your iPhone applications to verify that the ShoreTel Mobility Client has synced and downloaded correctly.

## Selecting a Notification Type

Set up how the ShoreTel Client application uses your phone's notifications. (Refer to your iPhone documentation for more information regarding notification types.)

1. From the Home screen, select **Settings > Notifications**.
2. Select the ShoreTel application.
3. Select the notification type you want.
  - From your mobile device on site—if you are on-site at your company, select the link in the email message to go directly to a web page which guides you through downloading and installing the client.
  - From your mobile device, remotely—Copy and paste the link from the email message into your mobile device's browser to go to a web site for instructions.
  - From a computer—if you are reading the email message on your computer, use a QR code reader app on your mobile device to scan the QR code in the email message. You can download a free QR code reader app from the your mobile phone's app store.

# Reprovisioning

If you have the ShoreTel Mobility Client running on a device and you see a prompt that it requires provisioning or that it is “Not Provisioned,” reprovision it as follows:

1. Connect to a Wi-Fi network or if your ShoreTel Mobility user account is configured to access Secure Enterprise Services using cellular data, you can provision while connected to a cellular data network.
2. From the main ShoreTel Mobility screen, touch the menu icon in the upper left corner to open the ShoreTel Mobility options menu.
3. Select **Settings > Advanced > Provisioning**.
4. Read and **Accept** the **Emergency Call Warning** page to continue. If you do not accept the Emergency Call Warning, the ShoreTel Mobility Client exits without provisioning.
5. If you are connected to your enterprise local Wi-Fi network, select **Next** and continue to the next step. Otherwise, enter your password and set **Remote Provisioning** to **ON** and select **Next**.

When you are provisioning remotely, for example not connected directly to your local enterprise Wi-Fi network, enter the public IP address and port number of the Mobility Router and select **Next** to continue.

6. Select **Replace an existing device** from the list of earlier provisioned devices. If more than one of your devices is provisioned against this Mobility Router, a list of your devices appears, with the Primary Device listed first during provisioning.
7. If you want to make this device the Primary Device, select **Yes**. The default is **No**. Select **Next** to continue.
8. Fill in the phone number of the iPhone in the Mobile Number field. The **Enterprise Extension** and **Enterprise Full Number** fields are populated from the ShoreTel Mobility Router.
9. Select **Next**.
10. Read the Provisioning message, and select **OK** to automatically exit the ShoreTel Mobility Client application.

## Updating to the Latest ShoreTel Mobility Client

New updates appear in iTunes or the App Store when they become available. Update your ShoreTel Mobility Client when you see an alert on your screen.

**Note**

If you see the following error message, update your Client to a newer version:

"Provisioning Error - Your account is prohibited to add device with old Client Version (below 6.0)."

To update your Client, check the app store or iTunes to find the latest version.

## Uninstalling the ShoreTel Mobility Client

You can uninstall the ShoreTel Mobility Client as follows:

1. From the Home screen, touch and hold the ShoreTel Mobility Client. An **X** appears next to the application.
2. Touch **X** next to the ShoreTel Mobility Client application. You see a popup warning about deleting the application.
3. Touch **Delete** to remove the application.

## Using Your Mobile Device with the ShoreTel Dock

If you have a ShoreTel Dock, when you insert your mobile device into it, the ShoreTel Mobility Client automatically opens and uses the dock's connections and speakers. If you insert your mobile device into the dock, but you do not have the Client installed, you are prompted to install it.

# CHAPTER

# 2

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## Getting Started

Use this chapter to familiarize yourself with some of the basics of how the ShoreTel Mobility Client is integrated with your mobile device, including the following topics:

<a href="#">The Mobility Client Application User Interface .....</a>	15
<a href="#">Exiting The Mobility Client.....</a>	17

## The Mobility Client Application User Interface

When you first open the ShoreTel Mobility Client, you see the keypad screen.

When the Mobility Client is active, touch the menu icon in the upper left corner or drag the screen to the right to open the ShoreTel Mobility options menu to see the following options:

- **search bar**—Touch the search bar at the top of the options menu to search your Favorites, Contacts, Recents, and more. Touch **Continue Search on Enterprise Directory** to search for a person in the enterprise directory.
- **Favorites**—View contacts that you have marked as favorites.
- **Contacts**—View your contact list.
- **Keypad**—Open the ShoreTel Mobility dialer to make calls.
- **Recents**—View the most recent activity in the call log.
- **Voicemail**—Access enterprise voice mail.

- **Buddies**—When Presence is enabled, displays your status and location in the system, as well as the presence of others (aka “buddies”) configured in the enterprise and registered on the server.
- **Today**—If enabled, access your calendar items for the day. Directly dial into conferences, if your calendar event has a phone number.
- **Settings**—Access the following settings and advanced options:
  - **Preferences**—Set your preferences for Call Handling, Data and Call Routing, Presence/IM, Voicemail, and Calendar.
  - **Advanced Settings**—View your mobile device’s configuration, access settings for Calendar, Communicator, Setup, Provisioning, and Troubleshooting.
- **Help**—Get help, watch tutorial videos, and see version information about Mobility Client. For more information, see [Getting Help on page 54](#).

The following table lists the Mobility Client icons.

**Table 1: Mobility Client Icons**

Icon	Name	Description
	Mobility Application	You have installed the Mobility application.
	Enterprise Services	Your mobile device can use enterprise services, such as directory query.
	Enterprise VoIP	Your device can make VoIP calls using the enterprise Wi-Fi network.
	Not Registered	
	Wi-Fi Call	Your device can make VoIP calls using the enterprise Wi-Fi network.
	VoIP Call over Cellular Data	Your device can make VoIP calls using the cellular data network.
	Call	You have an active call.
	Instant Message	You have an active instant message.
	Personal Dial	Personal Dial mode is on and active.

**Table 1: Mobility Client Icons (*continued*)**

<b>Icon</b>	<b>Name</b>	<b>Description</b>
	Voice mail	You have voice mail.
	Available	Status is available.
	Busy	Status is busy.
	Unavailable	Status is unavailable.
	Do Not Disturb	Do Not Disturb is on.
	In a Meeting	Status is In a Meeting.
	On a Call	Status is On a Call.
	Unknown	Status is not known.
	Home	Location is Home.
	Work	Location is Work.
	On the Road	Location is On the Road.
	Custom	Status is a custom message.

## Exiting The Mobility Client

1. Press the Home button to return to the Home screen.

2. Double-tap the Home screen to see a list of running applications.
3. Touch and hold the ShoreTel application until it wiggles and the – sign appears.
4. Touch the – sign next to the ShoreTel application.
5. Touch the Home button twice to return to the Home screen.

# CHAPTER

# 3

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## Managing Calls

Using the ShoreTel Mobility Client application dialer feels the same as using your device's dialer. Just as before, you can put a call on hold and take another call, switch between active calls, transfer calls to another number or your desk phone, access enterprise and cellular voice mail, and make conference calls, as explained in the following sections:

Receiving Calls .....	19
Placing Calls .....	21
Ending an Active Call .....	22
Using Personal Dial (Dual Persona™) Mode .....	22
Using Contacts and Recents to Place Calls from the ShoreTel Mobility Client .....	23
Using the Speaker.....	24
Muting a Call .....	24
Switching Between Calls.....	24
Transferring Calls.....	24
Managing Conference Calls.....	25
Changing the Network While on an Active Call.....	26
Accessing Voice Mail .....	26
Making Emergency Calls .....	27

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## Receiving Calls

The main Mobility Client icon appears when you have an incoming call. You also see an icon indicating whether the call is a VoIP or cellular call. You may also see icons for other in-call options which may be different from your mobile device's native dialer options.

When you receive an incoming call, choose one of these options:

- Answer—Touch the green **Answer** key.
- Ignore—Touch the red **Decline** key or **Decline with Message** to add a message.

Your mobile device's screen becomes active when you answer the call.

If you receive a call while the application is running in the background, a notification appears on the screen.

Touch the notification to respond, as follows:

- **Answer**—The call is immediately answered and the in-call options appear.
- **Ignore**—The call is ignored and listed in your call log as a missed call, or send directly to voice mail, if your voice mail is configured.

If receiving a call while the device is locked, choose one of these options:

- **Answer**—Select **Slide to Answer**. If appropriate, enter your password. The call is immediately answered and the in-call options appear.
- **Ignore**—Press the On/Off (Sleep/Wake) button on the top of your mobile device. The call is ignored and placed into your call log as a missed call.

## Accepting or Declining a Call While on Another Call

If you receive a second call while you are on a call, you hear a call waiting tone, and the screen indicate that there is another incoming call.

### To answer a call while on another call:

- Select **Answer + Hold** to answer the incoming call and put the first call on hold. The incoming call becomes the active call.
- Select **Answer + End** to answer the incoming call and end the first call.
- For information about switching between calls see [Switching Between Calls](#) on page 24.

### To decline a call while on another call:

- Select **Decline** to decline the incoming call.

To reject incoming calls before your device rings, touch your extension on the dialer to turn on Do Not Disturb (or select **More > Settings > Call Settings > Do Not Disturb**). To go back to allowing incoming calls to ring the device, touch DND on the dialer to display your extension number, or select **More > Settings > Call Settings** to turn DND off.

You can also use other apps on your mobile phone while on a call. Just touch the Home key to put the ShoreTel Mobility Client into the background. To return to your call when you are done, touch the bar at the top of your screen.

### To forward calls:

- For information about switching between calls see [Changing Call Handling Preferences](#) on page 50.

## Receiving a Call while Paired with a Bluetooth Device

When you pair a Bluetooth device, after you touch **Answer**, a pop up message appears showing the names of the available devices. Select your audio device name to continue. If you do not select anything, the default device is used. The message window closes after five seconds.

## Placing Calls

Place a call by using the keypad to enter numbers or by selecting a contact from your contacts, buddies list, or recent calls.

If you are using the Mobility Client application to make a call over the cellular network, the call is initially routed to the enterprise before being placed to the number you are calling. Refer to [Changing Data and Call Routing Preferences](#) on page 51 for details.

The following types of calls are not routed through the enterprise:

- Direct call number defined in the Mobility Router's dial plan (for example, 411).
- Calls with numbers starting with an asterisk (\*) or the pound sign (#) (for example, \*646# to check remaining cellular plan minutes).
- Emergency calls. Refer to [Making Emergency Calls](#) on page 27 for specific information about placing an emergency call and the conditions under which these calls are allowed.

Complete the following steps to make a call:

1. From the keypad screen, enter the phone number you want to call.
2. Touch the **Call** key or touch the **Call Using** key to the left of the Call key to select how you want to place the call (over **Wi-Fi**, **Cellular Voice**, or **Personal Dial**, for this call only).

## Placing an Active Call on Hold

To place an active call on hold:

1. Select **Hold**.
2. To make the call active again, select **Hold** again.

## Placing a Call While on an Active Call

To make another call while on an active call:

1. Select **Add call**. The keypad opens.
2. Enter the new number and select **Call**.



### Tip

To return to the first call without adding a new call, select the red **Touch to return to call** bar at the top of the screen.



### Note

If you are on a call using the enterprise network and enter a direct call number as defined in the Mobility Router's dial plan (for example, 411) or a phone number that starts with an asterisk (\*) or pound sign (#), the call on the enterprise network is dropped.

Calls to non-routable three-digit numbers (such as 911, 411, N11) or numbers starting with an asterisk or pound sign are placed directly using the cellular network and not routed through the application. You cannot simultaneously have an enterprise network call and a call routed directly through the cellular carrier's network on the mobile device.

If you have an active call and a call on hold, you can switch between the calls. For more information about switching between active calls, see [Switching Between Calls](#) on page 24.

## Placing a Call while Paired with a Bluetooth Device

When you pair a Bluetooth device, after you touch **Call**, a pop up message appears showing the names of the available devices. Select your audio device name to continue. If you do not select anything, the default device is used. The dialog closes after five seconds.

## Ending an Active Call

Touch **End Call** to end an active call.

## Using Personal Dial (Dual Persona™) Mode

By default, **Business Dial** is enabled, which means when you place a call with your mobile device while running the application, the call is routed through the enterprise, and your caller ID is your enterprise phone number. Business dial through the enterprise gives you access to one enterprise phone number, enterprise telephony features, conference calling, transfer-to-desk-functionality, and so on.

Switch to **Personal Dial (Dual Persona)** mode when you want to place a call directly over the cellular network (not routed through the enterprise) and use your mobile device's phone number as the caller ID.

For example, if your enterprise phone number is 919-8000, this number is used as the caller ID when you make phone calls that are used in **Business Dial** mode. If the phone number of your cell phone is 555-4442, when you place a call with **Personal Dial** enabled, the caller ID used is 555-4442, and the call is directly placed over the cellular network.



#### Note

Personal Dial mode stays on until you select Business Dial again.

## Enabling/Disabling Personal Dial

Business Dial is the default mode. To enable Personal Dial, enter the number you want to dial, and then touch the icon in the lower left corner. In the popup menu, select Personal Dial.

You can also touch your extension in the icon bar at the top to open Common Settings and set **Personal Mode** to **ON**. After enabling **Personal Mode**, you can place a call as you normally would. Personal Dial mode stays on until you switch it off.

## Using Contacts and Recents to Place Calls from the ShoreTel Mobility Client

You can use the Contacts and Recents on your mobile device with the ShoreTel application.

### Using Contacts to Place Calls

1. From the application main menu, select **Contacts**.



#### Note

Refer to your iPhone documentation for instructions on how to sync groups from other sources, including email, and enable those groups so that they display on this screen.

2. Select a **Group**.
3. Select a **Contact** to show details, then select the number to **Call**.

### Using Recents to Place Calls

1. From the ShoreTel options menu, select **Recents**.
2. Select **All** to view all recent call activity, or select **Missed** to view only missed calls.

3. Select the number you want to call.

**Note**

Select **Messages** to view your Instant Message activity. Refer to [Sending Instant Messages to Buddies on page 35](#) for more information.

## Using the Speaker

While you are on an active call, select **Speaker** to use the phone in hands-free mode.

**WARNING!**

Do not hold the mobile device to your ear while the Speaker is on.

- To turn on the loudspeaker, select **Speaker**.
- To turn off the Speaker, select **Speaker** again and hold the device to your ear again.

## Muting a Call

While you are on an active call, you can mute your line so that the other party cannot hear you.

- To mute an active call, select **Mute**.
- To unmute an active call, select **Mute** again.

## Switching Between Calls

If you have one active call and one call on hold, you can switch between the calls. To switch between calls:

- Select **Swap**.

If you have one active call and one call on hold, moving out of range of the enterprise Wi-Fi network, drops the call on hold.

## Transferring Calls

While you are on an active call on your mobile device, you can transfer the call to a specified phone number or another one of your devices.

By default, transferring a call to your desk phone transfers to your enterprise extension. For more information, see [Changing Data and Call Routing Preferences on page 51](#).

1. During the active call, select **Transfer**. The call is put on hold.
2. Select **Move to my other device** or **Transfer to someone else**.
  - Select **Move to my other device** to transfer this call to your desk phone.



#### Note

Depending on your IP PBX, if you have more than one device, the call rings all other devices. You can answer any of these other devices, including your desk phone. Contact your ShoreTel Mobility administrator for details about your configuration.

- Select **Transfer to someone else** to transfer this call to a contact. Enter the contact's number or select **Contacts** and then the name of the contact from the list.
- 3. To end the original call before transferring, select **End Call**.

## Transferring a Call While on the Cellular Network

1. To transfer a call while on a cellular call, press the Home button.
2. Touch the ShoreTel Mobility icon.
3. Select **Transfer** and continue as in [step 2 of Transferring Calls on page 24](#).

## Managing Conference Calls

You can merge two VoIP calls into a conference. You can start conference calls while connected to the enterprise Wi-Fi network or while using the cellular network as long as the outgoing calls are routed through the enterprise and you are using Secure Remote Voice.



#### Note

You cannot make a conference call using the cellular network.

To make a conference call:

1. Place a call to one of the conference call members.
2. While the call is active, touch **Add**. This call is put on hold.
3. Use the keypad to enter the number of the other conference call member, or select a Contact, Buddy, Favorite or Recent. Select **Merge calls**.
4. Select **End Call** to end the session.

# Changing the Network While on an Active Call

You can set the default network used to place and receive calls using the Network Preferences tab. Refer to [Changing Data and Call Routing Preferences on page 51](#) for more information.

## Changing from Wi-Fi to Cellular

After placing or receiving a call on Wi-Fi, touch **Handover**. The call is moved to the cellular network. The dialer application appears.



### Note

If your call fails to connect more than once due to a weak connection, you are prompted to switch back to Wi-Fi.

## Changing from Cellular to Wi-Fi

1. After placing or receiving a call on the cellular network, and with a Wi-Fi network available, double-tap the Home button, or select the Home button > **ShoreTel**. The green bar at the top of the screen indicates a call is in progress.
2. Select **Handover**. The call is moved to the Wi-Fi network. The green bar is replaced by the application bar.



### Note

If your call fails to connect more than once due to a weak connection, you are prompted to switch back to cellular data.

# Accessing Voice Mail

You can access enterprise (corporate) voice mail from your mobile device:

If ShoreTel Communicator features are enabled, refer to [Using Visual Voice Mail on page 62](#) to access visual voice mail. Visual voice mail allows you to view all (undeleted) voice mails at a glance, and enables you to choose which voice mail to listen to. Also see [Enabling ShoreTel Communicator](#) on page 61.

## Accessing Cellular Voice Mail

To access cellular voice mail:

1. Activate Personal Dial mode. See [Enabling/Disabling Personal Dial on page 23](#).
2. Touch and hold the **1** key on the keypad.

## Accessing Enterprise Voice Mail

To access enterprise voice mail:

1. Activate Business Dial mode, if it is not already active. See [Enabling/Disabling Personal Dial on page 23](#).
2. Press and hold the 1 key on the keypad.

If ShoreTel Communicator features are enabled, you can see and listen to individual voice mail messages in your enterprise voice mail using the voicemail tab. Refer to [ShoreTel Communicator](#) on page 61.

## Making Emergency Calls

To make a call to an emergency number, dial the emergency number as you normally would. Calls that you make to emergency numbers are not routed through the enterprise.



### Note

If **Enable Emergency calls over VoIP** is set on the ShoreTel Mobility Router, you can make 911 calls over Wi-Fi or cellular data network. Check with your System Administrator for more information. However, no matter what the ShoreTel Mobility Router's settings are, if you are on the cellular network and coverage is detected, the application uses this method to make emergency calls.



### WARNING!

If **Enable Emergency calls over VoIP** is not set (disabled) on the ShoreTel Mobility Router, and your mobile device *cannot access the cellular network*, you cannot make emergency calls.

If you are on a call using the enterprise Wi-Fi network and make a call to an emergency number, the non-emergency call is dropped.

On GSM devices, you can also make emergency calls even if there is no SIM card in the mobile device if your cellular service provider supports this feature.



# CHAPTER

# 4

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## Presence and Instant Message

After installing the ShoreTel Mobility application, if Presence is enabled, your mobile device shows your status and location, as well as the presence of your buddies who are configured in the enterprise and registered on the server. Your Presence is automatically updated, for example, if you are available, in a meeting, or traveling, and so on.

This chapter contains the following sections:

Presence Icons .....	30
Enabling Presence .....	31
Setting Presence Status.....	31
Setting Location .....	31
Editing the Presence Message .....	32
Adding and Deleting Buddies.....	32
Setting a Buddy's Access Level.....	33
Viewing Buddy Details .....	34
Sorting the Buddy List.....	34
Creating Groups of Buddies.....	34
Adding a Buddy to a Group .....	35
Sending Instant Messages to Buddies.....	35
Logging In/Out.....	39
Sending Email to a Buddy.....	39
Calling a Buddy .....	40

# Presence Icons

The following table shows Presence status icons:

**Table 2: Status Description**

Description	Icon
Available	
Busy	
Unavailable	
Do Not Disturb	
In a Meeting	
On a Call	
Unknown	

The following table describes location icons:

**Table 3: Location Description**

Description	Icon
Home	
Work	
On the Road	
Custom	

# Enabling Presence

Enable Presence to add or delete buddies, create groups of buddies, sort buddies, as well as allow others in the network to view your location and your availability.



## Note

When you enable Presence for the first time, the application may prompt you to confirm your user name and password if your server user name differs from your Mobility Router user name. Enter your credentials to resolve this authentication.

Complete the following steps to enable Presence:

- From the keypad, touch your connection status icon in the upper right.

Alternately, you can select the menu button in the upper left of the main screen to open the ShoreTel menu, and then touch **Settings > Preferences > Presence/IM**. Verify that **Presence** is set to **On**.



## Note

The **Presence User Name** can differ from the name used to provision the device. For example, if someone borrows your device, touch **Presence User Name** and enter that person's Presence user name.

To find out your Buddies's current status on the network, from the main ShoreTel options menu, touch **Buddies**.

# Setting Presence Status

Set your Presence status so your buddies can see your availability, as follows:

1. Touch your own Presence icon at the top of the ShoreTel main menu to open the Common Settings menu.
2. Touch **Availability** to set your status.



## Note

Depending on the status you choose, the indicator next to your buddy name changes.

# Setting Location

On your primary device, set your location to allow your buddies to view your location status, as follows:

1. Touch your own Presence icon at the top of the ShoreTel main menu to open the Common Settings menu.
2. Touch **Location** to set your location.

**Note**

Depending on the status you choose, the indicator next to your name changes.

## Editing the Presence Message

On your primary device, set an outgoing note from you that all of your buddies see, as follows:

1. Touch your own Presence icon at the top of the ShoreTel main menu to open the Common Settings menu.
2. Touch **Note** to enter a customized status message. Touch **Save** to set your new status.

## Adding and Deleting Buddies

You can add or delete buddies.

### Adding Buddies

To add a buddy:

1. Select the menu button in the upper left of the main screen to open the ShoreTel menu.
2. Touch **Buddies** to open your buddy list.
3. Touch **Edit > Add Buddies**, and then enter the first few characters of your buddy's name or email address as it is entered on the enterprise server.
4. Touch **Search** to continue.
5. Touch the button next to the buddy's name to display a **+**.
6. Touch **+** to add your buddy to your buddy list, and then touch **Done**.
7. Select whether to add the buddy to a contact group and touch **Add** to add the buddy to your buddy list.

## Deleting Buddies

To delete buddies:

1. Select the menu button in the upper left of the main screen to open the ShoreTel menu.
2. Touch **Buddies** to open your buddy list.
3. Touch **Edit** in the upper right.
4. Touch **Delete** in the lower left to delete the buddy.

## Setting a Buddy's Access Level

You can give your buddies the following different access levels to your network.

**Table 4: Access Level Description**

MS OCS	MS Lync	Description
Personal	Friends and Family	Contacts see your published contact information, including work, home, mobile and other phone numbers.
Team	Workgroup	Contacts see your published work and mobile phone numbers.
Company	Colleagues	Contacts see your work contact information. If you have Outlook 2003 or later and Office Communicator 2007 installed, Office Communicator can gather calendar and other Outlook related information and provide the information to Communicator Web Access for display in the contact card
Public	External Contacts	Contacts see your name, email address, title, company, and your status
Blocked	Blocked Contacts	Contacts cannot send you instant messages, and they can only see your name and e-mail address. Your status appears as offline



### Note

Depending on the configuration of your mobile device and server, you might see different options from the following examples.

Complete the following steps to change a buddy's access level:

1. From your buddy list, open the buddy's details by touching the blue arrow icon to the far right of a buddy's name.

---

2. Touch **Access**, and then set the appropriate access level.

## Viewing Buddy Details

---

You can view buddy status, location, and contact information, as follows:



### Note

Depending on the configuration of your mobile device and server, you might see different options from the following examples.

---

1. Touch **Buddies**.
2. Touch the blue arrow to the right of a buddy's name to view your buddy's detailed information.

## Sorting the Buddy List

---

Use the following steps to sort your buddies:

1. From your buddies list, touch the Settings icon in the lower right corner.
2. Touch **Display Options**, and then choose if you want to sort the list by **Name**, **Availability**, or **Location**.
3. Use the **Groups** area to display **All buddies**, **Online buddies only**, or **Blocked buddies**.

## Creating Groups of Buddies

---

You can create groups of Buddies. After creating a group, assign buddies to the group. Refer to [Adding a Buddy to a Group on page 35](#) for more information.

To create a group:

1. From your buddies list, touch **Edit**.
2. Touch **Edit Groups**.
3. On the Groups screen, touch **Edit** in the upper right corner to add a group.
4. Touch **Add** to add a group name.
5. Touch **Done** to save the new group.

# Adding a Buddy to a Group

You can assign buddies to a group or groups, and you can move buddies between groups.

Create a group before assigning a buddy to it. Refer to [Creating Groups of Buddies on page 34](#) for more information.

Use either of these methods for adding a buddy to a group: “[Assigning a Buddy to a Group using Buddy Details](#)” or “[Sending Instant Messages to Buddies](#)”.

## Assigning a Buddy to a Group using Buddy Details

To assign a buddy to a group using buddy details:

1. Touch the blue arrow to the right of a buddy to view details.
2. Touch **Groups** and select the appropriate group or groups.
3. Touch **Save** to continue, or touch **Cancel** to return to the buddy’s details without saving changes.

## Assigning a Buddy to a Group using Edit Groups

To assign a buddy to a group by editing the group:

1. From the buddy list, touch **Edit** in the upper right.
2. Touch **Edit Groups** at the bottom of the screen.
3. Select a group and touch **Add**.
4. Enter the name or email address of your buddy and touch **Search**.
5. When you see your buddy’s name, select it to add it to the group.

# Sending Instant Messages to Buddies

Use the Instant Message (IM) feature to chat with a buddy when Presence and IM are enabled.



### Note

To send an IM, you need data connectivity to the Presence server. (For more information, refer to [Using Instant Message While on a Call on page 38](#).)

Also, a buddy with the status of **Do Not Disturb (DND)** or **Offline** cannot receive IMs.

**Tip**

You can copy and paste IMs. Touch and hold an IM to use your mobile device's copy and paste functions.

## Viewing IM History

To set how long to keep IMs:

1. Select the menu button in the upper left of the main screen to open the ShoreTel menu.
2. Select **Settings > Preferences > Presence/IM**.
3. Touch **IM History**, then select the amount of time to keep IMs.

## Enabling/Disabling IM Notifications

To enable/disable receiving notifications for new IMs:

1. Select the menu button in the upper left of the main screen to open the ShoreTel menu.
2. Select **Settings > Preferences > Presence/IM**.
3. Toggle **New IM Notifications** to **On**.
4. Optionally, toggle **IM Notification Sound** to **ON** if you want to be alerted about new IMs with a sound.

## Enabling IM Preview

1. Select the menu button in the upper left of the main screen to open the ShoreTel menu.
2. Select **Settings > Preferences > Presence/IM**.
3. Toggle **Message Preview** to **On**.

## Starting a Conversation

To start an IM conversation:

1. From your buddy list, touch a buddy to open a chat window. (You can also touch **Messages** from the ShoreTel options menu to continue a previous conversation.)
2. Type a message to the buddy and touch **Send**.

## Replying to an IM

When you receive an IM, the message pops up on your device's screen, and the cursor flashes in the IM text field. Reply to an IM, as follows:

- Type your message and touch **Send** to send it.

## Open and Close Instant Message Conversations

You can open previous conversations to continue them.

- From the ShoreTel options menu, touch **Messages** to view all of your previous and current IM conversations.
  - Touch a conversation to open it and continue it, if you want.
  - When you are finished, touch **Messages** to return to your messages list.

## Starting Multi-Party Conversations

You can add participants to a conversation to create a multi-party conversation. When you start a multi-party conversation, you are called the Moderator, which means you can also remove one or more participants from the conversation.

### Adding Participants

1. After you start an IM with one participant, select **Options > Participants**.
2. Select the plus sign next to the buddy you want to add to the conversation and then touch **Done**.

### Replying to a Multi-Party Conversation

When you receive a multi-party IM, the message pops up on your screen, and the cursor flashes in the IM text field. Enter text as described in [Replying to an IM on page 36](#). Everyone in the conversation can see your messages.

### Switching Devices in the Middle of a Conversation

If you are in an IM conversation and need to switch to another one of your configured devices (including your computer), you can automatically re-join the conversation without losing any of your incoming messages.

### Removing Participants

When you start a multi-party conversion, you are the Moderator, which means only you can remove participants from a conversation.

- In an IM with at least two participants, select **Options > Participants**, and then touch the red X next to the participant you want to remove from the conversation.

Using the desktop instant message client, a Moderator can grant Moderator privileges to other users. (Refer to your desktop instant message client documentation for more information about granting Moderator permissions.)

**WARNING!**

You cannot remove a Moderator from a conversation.

## Making and Receiving Calls while Using Instant Messages

You can make or receive a call during an Instant Message session.

### Making a Call During an IM Session

1. From the IM conversation, touch the menu icon in the upper left to open the ShoreTel options menu, and then touch **Recents** to return a call, **Buddies** to call a buddy, or touch **Keypad** to dial a number.
2. Touch the number or buddy name to call it, or enter a number using the keypad.

### Receiving a Call During an IM Session

If you receive a call during an IM session, the call appears in the main window. Respond to the call using the **Answer** or **Decline** options.

## Using Instant Message While on a Call

You can respond to IMs during a call just as you would a normal IM session. The caller is not put on hold.

To send to an IM while on a call:

1. While on a call, select your mobile device's **Home** key.
2. Select the ShoreTel Mobility application.
3. To send a two-party message,
  - a. Select **Buddies**.
  - b. Select **IM**. Follow the standard Instant Message procedure to send an IM as described in [Starting a Conversation on page 36](#).
4. To send a multi-party message
  - a. Select **Buddies**.
  - b. Select **IM**. Follow the standard Instant Message procedure to send a multi-party IM as described in [Starting Multi-Party Conversations on page 37](#).

To respond to an IM while on a call:

1. While in a call, a pop-up appears if you receive an IM.
2. Select **Close** or **View**.



### Note

To turn on or change the vibration setting, touch **Settings > Preferences > Presence/IM > IM Notification Vibrate**.

---

## IM Sessions

During an IM session, you can view active IMs, as follows:

1. Touch a conversation to open it. From the ShoreTel options menu, select **Messages**.
2. Touch **Edit** to display options for the IM.
3. Touch the red minus sign to display the **Delete** button.
4. Touch the **Delete** button to close and delete the conversation.

---

## Logging In/Out

Log off of the Presence server, as follows:

1. From the ShoreTel Mobility options menu, touch **Settings > Preferences > Presence/IM**.
2. Touch **Presence** to turn it **OFF**.

Log on to the Presence server, as follows:

1. From the ShoreTel Mobility options menu, touch **Settings > Preferences > Presence/IM**.
2. Touch **Presence** to turn it **ON**.

---

## Sending Email to a Buddy

First, configure your mobile device's email settings if you have not already done so. Then, send an email to a buddy, as follows:

1. From the ShoreTel Mobility options menu, touch **Buddies**.
2. Touch the blue arrow to the right of your buddy's name to view details.

If your buddy has an email address registered on the server, it appears in their buddy details.

3. Touch your buddy's email address to display to open your mobile device's email app so you can begin typing your message. Send the message as you normally would.

## Calling a Buddy

Call a buddy's cellular or enterprise device, as follows:

1. From the Shoretel Mobility options menu, touch **Buddies**.
2. Touch the blue arrow next to a buddy's name to view details.
3. If your buddy has numbers configured on the server, you can touch **work**, **home**, or **cell** to call that number.

## Calling a Buddy While On Another Call

You can call a buddy while on another call. The first call is placed on hold when you call the second party. You do not need to manually place the first call on hold.

To call a buddy when already on a call:

1. Touch **Add Call > Buddies**.
2. Select a buddy to view details.
3. If your buddy has numbers configured on the server, you can touch **work**, **home**, or **cell** to call that number.

# CHAPTER

# 5

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## Secure Remote Access

Depending on how your account is configured, you may have access to the following secure remote access features:

- Secure Remote Voice (if licensed): You can securely place and receive calls using a Wi-Fi or VoIP over cellular data network outside of the enterprise. Secure Remote Voice uses Secure Sockets Layer (SSL) to ensure that your calls are secure. You can use Secure Remote Voice from home or any location with data connection and have access to enterprise and desk-phone features, just as you do when you are in the enterprise.
- Secure Enterprise Services: You can access services, such as directory query from any Wi-Fi or cellular data network also outside your enterprise.

Contact your ShoreTel Mobility administrator if you are not sure whether you have secure remote access enabled on your account.

This chapter contains the following sections:

Before You Begin .....	41
Verifying that Secure Remote Voice Is Enabled .....	42
Verifying that Secure Enterprise Services Are Enabled.....	42

## Before You Begin

---

To use Secure Remote Voice and Secure Enterprise Services, perform the following actions:

- Create a Wi-Fi access point on your mobile device for a non-enterprise Wi-Fi network. Refer to [Connecting to a Wi-Fi Network](#) on page 10 for details.

- Enable data access over Mobile network on the device.
- Configure and connect to a non-enterprise Wi-Fi network using your mobile device. This is optional if using cellular data.
- Configure preferred network settings. Refer to [Changing Data and Call Routing Preferences on page 51](#) for details.
- Add the non-enterprise Wi-Fi network as a preferred connection in the application. Optional if using cellular data.
- Verify that Secure Remote Voice and Secure Enterprise Services are accessible with your Mobility user account. Refer to [Verifying that Secure Remote Voice Is Enabled on page 42](#) and [Verifying that Secure Enterprise Services Are Enabled on page 42](#).

If you are using a Wi-Fi from a hotspot or similar network, you might need to access a public Web page after creating a Wi-Fi access point on your mobile device so that you can enable access to the Internet. After you have established Internet connectivity, you can then add the access point as a preferred connection in the application.



#### Note

Before you prepare to use Secure Remote Voice or access Secure Enterprise Services, verify that your Mobility user account is configured to use these features. If you are not sure whether you are authorized to use these features, contact your System Administrator.

---

## Verifying that Secure Remote Voice Is Enabled

---

After you add the remote Wi-Fi network as a preferred connection in the application, your mobile device automatically connects to the Wi-Fi network and is registered with your organization's IP-PBX system.

If you see the Secure Remote Voice icon, the mobile device is registered, which means VoIP is available. The icon's presence does not guarantee that all calls use Wi-Fi. The ShoreTel Mobility solution determines how to route a call based on the signal strength of the Wi-Fi network, even if VoIP is available.

## Verifying that Secure Enterprise Services Are Enabled

---

After you add the remote Wi-Fi access point as a preferred connection in the application, your mobile device automatically connects to the Wi-Fi network and attempts to register for Secure Enterprise Services.

You can securely access enterprise services such as directory search and the enterprise voice mail indicator when you see the following Secure Enterprise Services icon:





# CHAPTER

# 6

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## Searching for People, Places, and Things

The ShoreTel Mobility Client allows you to search the corporate directory from your mobile device when connected to the enterprise Wi-Fi network. You can search the corporate directory if your company uses an LDAP-based corporate (enterprise) directory server and your system administrator has configured the ShoreTel Mobility Router to search that directory server.

If you are outside the enterprise Wi-Fi network, you can search the corporate directory only if your system administrator has configured your ShoreTel Mobility user account to access enterprise services using a cellular data network. Searching the corporate directory using a remote Wi-Fi or cellular data network is a secure transaction.

This chapter contains the following sections:

<a href="#">Using the Corporate Directory outside of the Enterprise.....</a>	46
<a href="#">Searching Buddies, IM History, and More.....</a>	46
<a href="#">Searching the Corporate Directory.....</a>	46
<a href="#">Viewing Directory Search User Information .....</a>	47
<a href="#">Placing a Call Using Directory Search .....</a>	47
<a href="#">Adding a Directory Search Match to Contacts .....</a>	47
<a href="#">Creating a Favorite.....</a>	48
<a href="#">Deleting a Favorite .....</a>	48

# Using the Corporate Directory outside of the Enterprise

You can use the following networks to search the corporate directory when outside of the office:

- Cellular data network

Use the data network of your cellular service provider to access the corporate directory. The network depends on your service provider and the networks your mobile device supports. If you search the corporate directory using a cellular data network, you may incur data charges as described in your service plan. For information about your mobile device and cellular service plan, contact your cellular service provider or your system administrator.

- Wi-Fi network outside of the enterprise

If you can establish a connection to a Wi-Fi network with your mobile device, you can search the corporate directory.

For information about how to set up your mobile device to access Secure Enterprise Services, see [Secure Remote Access on page 41](#).

## Searching Buddies, IM History, and More

You can search for names and numbers in your Buddies, IM history, recent calls, meetings, voice mail numbers and more.

To search using the ShoreTel Mobility client:

1. Select the menu button in the upper left of the main screen, and then touch **Search** at the top of the menu.
2. Begin typing the name or number that you want to search for, and then select the magnifying glass to perform the search.
3. When you see a list of search results, touch an item to see its details.

## Searching the Corporate Directory

If your mobile device is connected to the enterprise Wi-Fi network, you can search the corporate directory just as if you were using your desk phone. If you have access to Secure Enterprise Services, you can also search the corporate directory using a remote Wi-Fi or cellular data network.

To search the corporate directory:

1. Select the menu button in the upper left of the main screen, and then touch **Search** at the top of the menu.
2. Begin typing the name or number that you want to search for in the corporate directory, then select the magnifying glass to perform the search.
3. Touch **Continue Search on Enterprise Directory**.

If a search matches a large number of records in the directory, you may not see not all records on your screen. If any names in the directory match the string that you typed, those names appear. For example, entering “joe” displays all users with first name or last name that start with this string.

## Viewing Directory Search User Information

If your search finds a match, you see any associated information that a user has chosen to display in the corporate directory (for example, home number or personal cell number).

The contact information that is listed depends on the information that is in the corporate directory. For example, if a person does not enter a home phone number in the corporate directory, you do not see a home phone number for that person in the additional contact information.

To see more details about a search results match:

1. From the list of Directory Search matches, scroll to the person’s name.
2. Touch the name to see more details.

The information you see for each person depends on what information the person has registered on the enterprise server.

## Placing a Call Using Directory Search

You can call a person in the directory search match list using the contact information from the list instead of manually dialing the person’s phone number.

To place a call using a directory search match:

1. From the search results, select the person to see their details, including the numbers they have registered on the server.
2. Touch a number to call it.

## Adding a Directory Search Match to Contacts

You can add contact information from any directory search match to your mobile device’s local contacts.

To add a Directory Search match to your contacts:

1. From the list of directory search matches, touch the person that you want to add to your contacts.
2. Select **Add to Contacts**.

3. Scroll the bottom of the contact information and touch either **Create New Contact** or **Add to Existing Contact** if you already have a different entry for that person.

## Creating a Favorite

---

To add a contact to your list of Favorites:

1. From the ShoreTel Mobility options menu, touch **Favorites**.
2. Touch the **+** at the top right to add a favorite.
3. Select a contact or use the search field to search for a contact. Select the contact to add to the **Favorites** list.

## Deleting a Favorite

---

To delete a contact from your list of Favorites:

1. From the ShoreTel Mobility options menu, touch **Favorites**.
2. Swipe across the favorite's name to see the **Delete** button. Select the button to delete the favorite.

# CHAPTER

# 7

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## ShoreTel Mobility Client Settings

You can modify preferences and advanced ShoreTel Mobility Client settings.

This chapter contains the following sections:

Changing Common Settings .....	49
Changing Preferences .....	50
Changing Advanced Settings.....	52
Getting Help .....	54

## Changing Common Settings

---

You can view some of the most commonly used settings by touching your Presence icon at the top of the keypad or the top of the ShoreTel options menu. You can change the following common settings:

- **Presence**—Change your **Availability** or **Location**. You can also add a custom message by touching **Note**.
- **Call Handling**—Select options, such as **Do Not Disturb**, **Personal Mode**, **Data and Call Routing** (for Wi-Fi or cellular data networks), or **Connection Status** to check how you are currently connected. For details, see [Changing Data and Call Routing Preferences on page 51](#).
- **Communicator**—Set your **Extension Assignment** to specify an alternate phone number you can use to answer calls coming into your ShoreTel extension or **Call Handling Mode** (for example, **Standard**, **In a Meeting**, **Out of Office**, **Extended Absence**, or **Custom**).

# Changing Preferences

---

You can modify the following preferences:

- Set how to handle your calls.
- Set how to route your calls and data.
- Change Presence or IM status.
- Change or verify voice mail numbers.
- Set calendar options for dialing conference calls.

## To change preferences:

Select the menu button in the upper left of the main screen, and then touch **Settings > Preferences**, and choose from the following settings:

- **Call Handling**—Set all of your call handling preferences, such as personal dial, call forwarding, and transfer options. For more information, see [Changing Call Handling Preferences](#) on page 50.
- **Data and Call Routing**—Set whether to use Wi-Fi (when available), cellular data, and cellular roaming. For more information, see [Changing Data and Call Routing Preferences](#) on page 51.
- **Presence/IM**—Set your Presence so your buddies can find you. Also set your IM notifications. For more information, see [Changing Presence/Instant Message Settings](#) on page 52.
- **Voicemail**—Set or verify your enterprise and cellular voice mail numbers.
- **Calendar**—If enabled, you can select a conference phone number in your daily calendar to directly call into a conference. For more information, see [Appendix A, Dialing from a Meeting Invitation, Calendar Appointment, or Email](#).
- **Location based service**—Select **On** to allow your geographical location to be identified. Select **On** for [Auto-Detect Location](#) to allow your location to be automatically detected. If **Off**, you can choose to manually enter your location.

# Changing Call Handling Preferences

You can change ShoreTel Mobility call settings. Select the menu button in the upper left of the main screen, and then touch **Settings > Preferences > Call Handling**, and then choose from the following options.

- **Specify Do Not Disturb**—Select **ON** to set your desk phone rings but your mobile device does not ring when you have an incoming call. Select **OFF** to revert to allowing incoming calls to ring your device.
- **Personal Mode**—Place calls directly over the cellular network (not routed through the enterprise) and use your mobile device's phone number as the caller ID.
- **Forward call to voice mail**—Forward all calls to voice mail.

- **Forward call to**—Forward all calls to a specified phone number. Enter the phone number to forward calls to.
- **Transfer to Desk Number**—Set the enterprise phone number to use when you transfer calls to your desk phone. By default, the extension of your enterprise phone number is used when transferring an active call from your mobile device to your desk phone.

If the PBX for your enterprise uses a phone number other than your extension to transfer active calls to your desk phone, you can specify that number. If you need more information about which number your PBX uses to transfer calls, contact your system administrator.

- **Reverse Dial**—In cases where Wi-Fi is unavailable, this parameter controls whether the call is initiated from the mobile device or from the ShoreTel Mobility Router.

In cases when it is cheaper to call from a landline rather than placing a call from a mobile device, the Reverse Dial setting helps control costs. Normally, outbound calls are dialed from the mobile device. When in Reverse Dial, outbound calls are placed from the ShoreTel Mobility Router to the mobile device. You still enter the number to be dialed as normal, however, based upon your settings, the system determines how to place the call.

- **On**—Reverse Dial is always used when not on Wi-Fi. When you make a call in this mode, the system calls you. A popup prompts you to answer. Select **Answer** to continue. Note that even though it appears you dialed an outbound call, the system “reverses” this action and calls you instead. You are prompted to select any number on the keypad to continue.
- **Off**—Reverse Dial is never used. Calls initiated in this mode are always treated as standard outbound calls.
- **Auto**—When there is no Wi-Fi available, Reverse Dial mode is always used when out of your home country, and never used when in your home country. When you make a call in this mode outside of your home country, the system calls you. A popup prompts you to answer. Select **Answer** to continue. Note that even though it appears you dialed an outbound call, the system “reverses” this action and calls you instead. You are prompted to select any number on the keypad to continue.

## Changing Data and Call Routing Preferences

1. Select the menu button in the upper left of the main screen, and then touch **Settings > Preferences > Data & Call Routing**.
2. In the **Allowed Data Networks** area, choose from the following options:
  - **Wi-Fi**—When enabled, Wi-Fi networks are used to connect to the ShoreTel Mobility Server whenever possible. When disabled, the ShoreTel Mobility application does not use Wi-Fi networks. This option may be disabled if the your account has not been enabled for cellular data access on the ShoreTel Mobility Router.
  - **Cellular Data**—When enabled, voice calls can be made using a cellular data connection. This option may be disabled if the your account has not been enabled for cellular data access on the ShoreTel Mobility Router.
3. In the **Call Routing Preferences** area, the following options are available:

- **Wi-Fi**—When enabled, Wi-Fi networks are used for voice calls when possible. If disabled, Wi-Fi networks are not used for voice calls.
- **Cellular Data**—When enabled, voice calls can be made using a cellular data connection. Voice calls over cellular data require a 3G or faster data connection.
- **Cellular Voice**—When enabled, enterprise calls will be placed as cellular voice calls when no data connections can be used. The enterprise call is still connected via the ShoreTel Mobility Router.
- Disable this option to prevent cellular voice calls from being used for enterprise calls. This option is only available if your account has been enabled for cellular voice calls on the ShoreTel Mobility Router.

4. Select **Preferences > Settings** and then the menu key to return to the main ShoreTel menu.

## Changing Presence/Instant Message Settings

1. Select the menu button in the upper left of the main screen, and then touch **Settings > Presence/IM**.
2. You can modify the following settings:
  - **Presence**—Turn Presence **ON** or **OFF**.
  - **Presence User Name**—The user name provisioned on the device can be different than the **Presence User Name**. For example, if someone borrows your device, touch this option to change the user name.
  - **IM History**—Select the appropriate option for the amount of history you want to display.
  - **New IM Notifications**—Set whether to receive notifications for new messages.
  - **New IM Notifications Sound**—Set whether to hear a sound when you receive a new IM.
  - **Message Preview**—Set whether to view a preview window of the IM.

## Changing Advanced Settings

You can modify the following advanced settings:

- View general configuration settings.
- View ShoreTel Communicator settings.
- View or change your Client setup.
- Reprovision a new or changed device.
- Set up calling from a calendar event.

- Turn on logging to help with troubleshooting.

### To change advanced settings:

1. Select the menu button in the upper left of the main screen, and then touch **Settings > Advanced**, and choose from the following settings:
  - **Configuration**—Verify the settings. These fields are read-only and can only be changed by re-provisioning the device.
  - **Communicator**—Set up ShoreTel Mobility Communicator options. See [Changing ShoreTel Communicator Settings](#) on page 53 for more information.
  - **Setup**—Choose from the following setup options:
    - Select **Echo Cancellation** and specify **On** (enabled) or **Off** (disabled).
    - For **Keep Wi-Fi Connected**, specify **On** (enabled) or **Off** (disabled). ShoreTel recommends enabling this option to ensure calls are received on the Wi-Fi network when the device has been idle for a long period of time.
    - Select **Primary Device** to change the setting to **Yes** and to make this device primary. (The device that you have with you most often.)
    - Select **Synchronize Configuration** to synchronize with the ShoreTel Mobility Router.
  - **Provisioning**—You do not need to reprovision a device unless you get a new one, switch between devices that use the same User ID, or unless your ShoreTel Mobility user account gets deleted from the Mobility Router. After you install the ShoreTel Mobility application, you can reprovision the device.
  - **Troubleshooting**—If you have problems, you can upload various types of logs to the ShoreTel Mobility Router. Turn **Enable Logging ON** and select either **Upload** or **Send log via email**. For the type of logging to use, contact your ShoreTel Mobility administrator for advice. For more information, see [Troubleshooting](#) on page 54.
2. Select **Advanced > Settings** and then touch the menu button to save changes and return to the main ShoreTel options.

## Changing ShoreTel Communicator Settings

You can use the following ShoreTel Communicator features when they are enabled. (Refer to [ShoreTel Communicator](#) on page 61 for more information about enable the features.)

**Table 5: ShoreTel Communicator Functions**

Function Name	Icon	Description
Extension Assignment		Provides a list of phone numbers that you can use as alternate numbers instead of your desk phone for routing incoming calls.
Visual Voice Mail		Displays the number of voice mail messages in the voice mailbox, and displays textual information of messages, such as date, time and duration.
Call Handling Mode		Changes the call handling mode on the ShoreTel Mobility client.

1. Select the menu button in the upper left of the main screen, and then touch **Settings > Advanced > Communicator**.
2. Toggle **Enable** to **On**.
3. Enter the Communicator **User Name**. This is the user name assigned to your Enterprise extension in Communicator for Mobile.

## Troubleshooting

Your mobile device can collect logs while making and receiving calls. If a problem occurs, you can upload the logs along with a short description of the problem to the Mobility Router for evaluation. You need a Wi-Fi or cellular data connection to upload troubleshooting logs. Alternately, you can email logs to ShoreTel Customer Support.

1. Select the menu button in the upper left of the main screen, and then touch **Settings > Advanced > Troubleshooting**.
2. Set **Enable Logging ON**.
3. Touch **Upload**.
4. Optionally, enter a brief description of the nature of the error in the **Subject** field, and then touch **Send** to upload the log.
5. Select **Delete** to clear the log and return to the **Debug Options** screen.



### Note

If the upload fails, touch **Send log via email** instead.

## Getting Help

The ShoreTel Mobility Client has help topics and tutorials available to help you if you have questions or problems.

To get help:

1. From the ShoreTel Mobility options menu, touch **Help**.
2. Choose one of the following options:
  - **Help Screens**—See the overlayed tips and pointers when you look at the main client screens.
  - **Tutorial Videos**—Watch videos for some of the main features of the client.
  - **Contacting Support**—Select **On** to enable your device to call your support center. . You may optionally view the support center's contact information, and/or send an email with an attachment of the issue's log file. In this case, touch **Send Log**. Your device's email application automatically pops up with the log information populating the email. Send the email to complete the operation.
  - **About**—See what version of the client you have. Check to see if updates are available.



# APPENDIX

# A

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## Dialing from a Meeting Invitation, Calendar Appointment, or Email

With the ShoreTel Mobility Client, when you receive a meeting invitation or email message with a link (or URL), you can select the link to join the conference. You can also dial extension digits to an automated attendant, in the following situations:

- Your device is connected to a corporate/enterprise Wi-Fi network.
- You are connected to a cellular network or remote Wi-Fi network *and* you are registered to the Mobility Router for secure enterprise features.

For dialing an automated attendant, the client also supports the following syntax:

**Table 6: URL-Based Dialing**

Device	wait/prompt	2 second pause
iOS	“;” “w”	“,” “p”

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## Enabling Calendar Conference Dialing

When you first start up the ShoreTel Mobility Client after installing it, you may be prompted to access your calendar and turn on your Today screen. Accessing your calendar lets you view your meetings and dial in to meetings.

---

If you did not turn on your Today screen so you can see your calendar, you can turn it on later, as follows:

1. From the ShoreTel Mobility options menu, touch **Settings > Preferences > Calendar**, and then set **Calendar Conference** to **ON**.
2. Set **Reminder** to **On**, and then select how many minutes ahead of the meeting you want a pop-up reminder with the conference link to open.

## Dialing From a Calendar Event

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After you accept a meeting invitation, it appears on your Today screen.

### To dial from a calendar event:

1. From the ShoreTel Mobility options menu, select **Today** to see a list of your next appointments. If the meeting or appointment has dial-in information, such as a phone number and passcode, you see a **Join** button next to it. If the meeting starts within the next 15 minutes, the Join button is green.
2. Select **Join** to call into the meeting. The conference passcode is automatically entered.

## Dialing From an Email Message

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You can also dial calls from selecting links in email message. The following table shows supported formats and example uses for this feature:

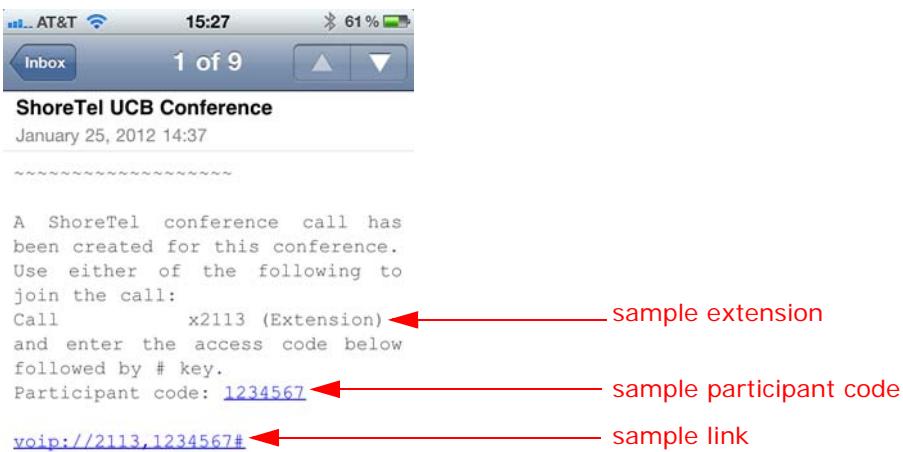
**Table 7: Supported Email Message Formats**

Format	Supported
Plain Text Email	✓
HTML Email	✓
Hypertext link in an Email Message	-
Microsoft® Outlook Calendar Invitation	✓

**Table 8: Examples**

Description
VoIP url with , and ; characters sent in an email where the email format is plain-text format  Example Syntax: <code>voip://2113,#;1234567#</code>
VoIP URL sent in a calendar invitation from the Outlook Exchange client on MS Windows 2010 (new meeting). The Client opens the calendar appointment so you can click the VoIP URL in the Notes section of the invitation.
VoIP URL sent in a calendar invitation from the Outlook Exchange on MS Windows 2010 through ShoreTel Service Appliance 100 Outlook Plug-in (for example, manually adding a VoIP URL as part of the ShoreTel Service Appliance 100 details in the invite).

In the following sample email invitation, you would touch the URL to dial into the call:





# APPENDIX

# B

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## ShoreTel Communicator

ShoreTel Mobility supports the following ShoreTel Communicator features when ShoreTel Communicator for Mobile is enabled:

- Extension Assignment—Provides a list of phone numbers that can be used as an alternate to a desk phone for incoming calls.
- Visual Voice Mail—Displays the number of voice mail messages and information such as date, time and duration, and allows you to listen to voice mail messages.
- Call Handling Mode—Changes the call handling mode on the ShoreTel Mobility client.

## Enabling ShoreTel Communicator

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To enable ShoreTel Communicator when your Communicator credentials are different from your ShoreTel Mobility credentials, refer to [Changing ShoreTel Communicator Settings](#) on page 53. In most cases, your ShoreTel Communicator and Presence server's user name and password are the same, enabling Communicator to automatically log on.

## Configuring Extension Assignment

The active Extension Assignment (EA) is an alternate phone number you can use to answer calls coming into the ShoreTel extension. For example, set EA as your home phone number to route all incoming calls to the ShoreTel extension to your home phone. When the EA is set to something other than your desk phone, the desk phone displays “Anonymous” on the screen. Calls placed from the desk phone in this state show “Caller ID unknown” on the called party’s display, since it is no longer assigned to you.

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The default is Primary Phone (desk phone).



#### Note

Define EA numbers in ShoreTel Communicator. Refer to your device-specific ShoreTel Communicator User Guide for more information. All additional EAs that you define in ShoreTel Communicator display on the ShoreTel Mobility Client. **Set EA** in the ShoreTel Mobility Client selects/enables the active EA.

---

Use the following steps when ShoreTel Communicator is enabled.

To select an Extension Assignment:

1. From the ShoreTel Mobility options menu, touch your own information at the top of the menu to open Common Settings.
2. Touch **Extension Assignment**.
3. Select **Primary Phone** to have incoming calls routed to your primary phone (in most cases, a desk phone). Select another EA in the list to have incoming calls routed to that phone number. In this case, the primary phone becomes “Anonymous”.

When anything other than Primary Phone is set, you will not receive incoming enterprise calls on your mobile device.

## Using Visual Voice Mail

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When you receive a voice mail message, select **Voicemail** from the ShoreTel Mobility options menu to play and manage voice mail messages. A number indicates how many unheard messages you have. In your voice mail list, a message that you have not listened to appears in bold. After you listen to it, it is no longer bold. You can return the call or delete the message.



#### Note

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Visual Voicemail is not available for the Extension Only user.

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## Checking Voice Mail

When ShoreTel Communicator is enabled, check your visual voice mail as follows:

1. From the ShoreTel options menu, select **Voicemail**.
2. Select/highlight a voice mail message from the list.
3. Select this message again (play button) to hear the voice mail.

You can play, pause, or re-listen to a voice mail message. If you receive a call in the middle of listening to a message, the message pauses until you are finished with the call. If you leave the voice mail screen during message playback, the message pauses until you return to the screen. Note that you cannot check voice mail during a VoIP call.

## Returning a Message

If a caller is one of your contacts or has caller ID enabled, you can call them back when they leave you voice mail message.

To return a call from a voice mail message:

1. Select the voice mail message from the list.
2. Touch **Call Back**.

## Deleting Messages

To delete a voice mail message:

1. Select a voice mail message from the list.
2. Touch **Delete**.

## Specifying Call Handling Mode

Call Handling Mode sets how to handle your inbound calls. One mode is always active.



### Note

Configure the Custom Call Handling Mode using the Configure Call Handling option in ShoreTel Communicator. This configuration is mirrored in the ShoreTel Mobility Client when you select Custom. Refer to the ShoreTel Communicator for Mobile User Guide for more information on configuring Custom Call Handling Mode.

To specify the current Call Handling Mode:

1. From the ShoreTel Mobility options menu, select **Settings > Preferences > Call Handling**.
2. Select the mode you want. A check mark indicates your current mode.



### Note

Selecting **Out of Office** sends all calls directly to voice mail without ringing your phone.

